


Amerivest® Powered by PFN

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Amerivest : Rebalance

Now we'll show you how your target allocation should be implemented using Exchange Traded Funds.

Your Current Ameriwest Allocation by Asset Class 

Total of Current Positions: \$10,000

	Asset Class	Current	Current%
■	Cash	\$700	7%
■	Short-Term Fixed Income	\$2,000	20%
■	Domestic S&P500 Cap	\$2,100	21%
■	Domestic Large Cap	\$1,600	16%
■	International	\$2,600	26%



Add or Remove Money

You can adjust your current investment in Ameriwest by adding or removing money. Input the amount, select between add money / remove money, and then click re-calculate to see the impact on your investment guidance.

Add Money

C. Remove Money

Since your last re-balance, you expected to save \$XXXX

Recalculate

Save & Close

Need more time?

**Need more time?
Save your work and return later.**

Four Target Allocation by Asset Class

Asset Class	Target%	Current%	%Drift	\$Drift
Cash	10%	3700	7%	-300
Short-Term Fixed Income	30%	\$2,800	2%	+100
Domestic Equities	20%	\$2,100	21%	+100
Domestic Large Cap	20%	\$1,650	16%	+650
Domestic International	20%	\$2,800	28%	+800

Recommended Transactions

The following transactions will bring your Amerivest portfolio into proper balance.

Asset Class	Exchange Traded Fund (ETF)	Buy/Sell	\$Amount
Short-Term Fixed Income	SPY iShares iBbox 1-3 yr Treasury Bond	Buy	\$100
Domestic SmallCap	SPY SPDRs	Sell	\$100
Domestic Large Cap	IVM iBox Russell 2000 Index	Buy	\$500
International	IVB iBox Russ Jones 100 Best Edg	Sell	\$500

By clicking on the Place Order button below you are submitting your order to Ameritrade, Inc., member NASD/SIPC.

Alert: It has been 6 months since your last Rebalance. Maximum-asset class drift is not greater than 2% or \$200.

Place Orders

Email support@managemybvo'n.com for help or to provide feedback

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